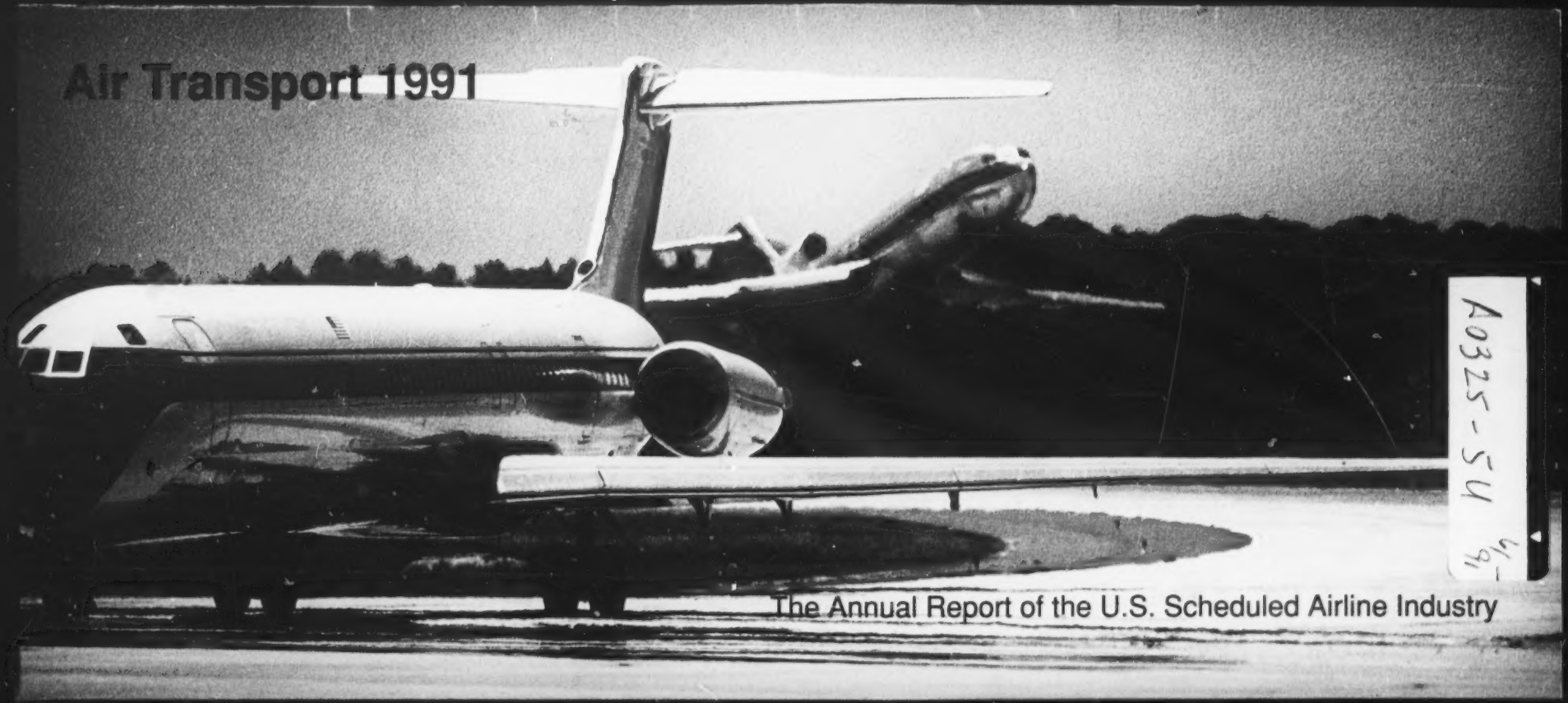
Air Transport 1991



The Annual Report of the U.S. Scheduled Airline Industry

A0325-SU 6/91

RA042

1990 HIGHLIGHTS

TRAFFIC	1989	1990	Percent Change
Passengers Enplaned (000)	453,692	465,557	2.6
Domestic Service	416,331	423,711	1.8
International Service	37,361	41,846	12.0
Revenue Passenger Miles (000)	432,714,309	457,915,220	5.8
Available Seat Miles (000)	684,375,876	733,353,609	7.2
Passenger Load Factor (%)	63.2	62.4	
Aircraft Departures	6,622,080	6,922,937	4.5
Cargo Ton Miles (000)	12,186,497	12,603,656	3.4
Freight and Express Ton Miles (000)	10,275,002	10,600,100	3.2
Mail Ton Miles (000)	1,911,495	2,003,556	4.8
Total Revenue Ton Miles (000)	55,457,924	58,395,179	5.3

FINANCIAL	1989	1990	Percent Change
Passenger Revenue ($000)	53,802,067	58,435,048	8.6
Domestic Service ($000)	43,156,524	45,723,610	5.9
International Service ($000)	10,645,543	12,711,438	19.4
Freight and Express Revenues ($000)	6,892,754	5,434,382	-21.2
Mail Revenues ($000)	955,455	970,489	1.6
Total Operating Revenues ($000)	69,315,854	76,105,419	9.8
Total Operating Expenses ($000)	67,504,587	78,019,476	15.6
Operating Profit ($000)	1,811,267	(1,914,057)	
Net Profit ($000)	127,902	(3,922,702)	
Rate of Return on Investment (%)	5.3	-6.0	
Operating Profit Margin (%)	2.6	-2.5	
Net Profit Margin (%)	0.2	-5.2	

Customized airline data services are available from the ATA Office of Industry Data.

Despite setting new records in passengers and cargo carried in 1990, the U.S. airlines lost $4 billion, virtually all in the fourth quarter when the cost of fuel doubled as the result of the Iraqi invasion of Kuwait.

One publication called 1990 a "nightmarish" year for the airlines and in fact it was the industry's worst business year ever. Losses continued at the same rate through the first quarter of 1991, as the effects of a deepening recession here at home and a steep decline in travel abroad brought on by the war took their toll. Air travel is only now returning to 1990 levels.

But lasting damage has been done. The huge losses have forced a number of carriers to cut back severely, to sell major assets, including international routes, aircraft and airport gates, and to postpone aircraft orders vital to future growth. Some 40,000 employees have been laid off, including 18,000 Eastern workers, when that pioneer airline closed down this past January ending more than 60 years of service.

Even though facing insurmountable financial problems, U.S. airlines provided critical support to our Armed Forces during the Gulf war, ferrying to the Middle East two-thirds of the troops and 25 percent of the airlifted cargo so vital to the war effort. We are extremely proud of this commitment of airline resources made during the nation's hour of need under the Civil Reserve Air Fleet (CRAF) program.

As we go to press, domestic and international air travel, spurred by fare discount programs, are beginning to show signs of bouncing back to their old growth patterns. We are confident that this growth will continue through the decade and beyond.

What we are not so confident of is the ability of governments – both here and abroad – to recognize that steps must be taken to curb excessive taxes and fees that are accumulating in air transportation. It is a worldwide problem and one that will inevitably stunt the growth of air travel if left unchecked. My colleague Günter Eser, director general of the International Air Transport Association, says that "the carriers are being increasingly charged – directly or indirectly – for services they do not need or excessive amounts for the services rendered."

Here in the United States, taxes and fees on passengers and shippers now amount to more than $6 billion annually. That is an increase of *81 percent* since 1980. By contrast, domestic air fares in the same period have increased just *15 percent*.

Governments still seem to view air travel as a luxury, to be taxed freely. But air travel is no longer the luxury that perhaps it once was. It is a service critical to the continued economic growth and vitality of the nations of the world.

The air transport industry needs leadership and support from governments throughout the world to help restore stability and financial health to its airlines. Only then will air transportation needs so vital to the strength and growth of our nations be met today, enabling us to plan intelligently for tomorrow.

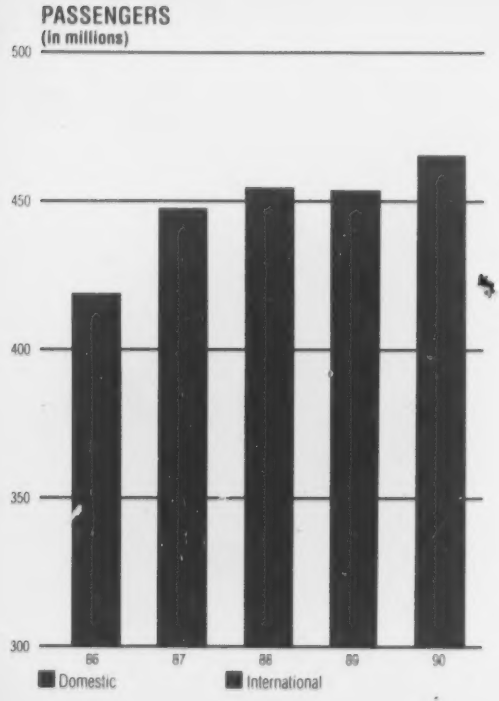
Robert J. Aaronson
President
Air Transport Association

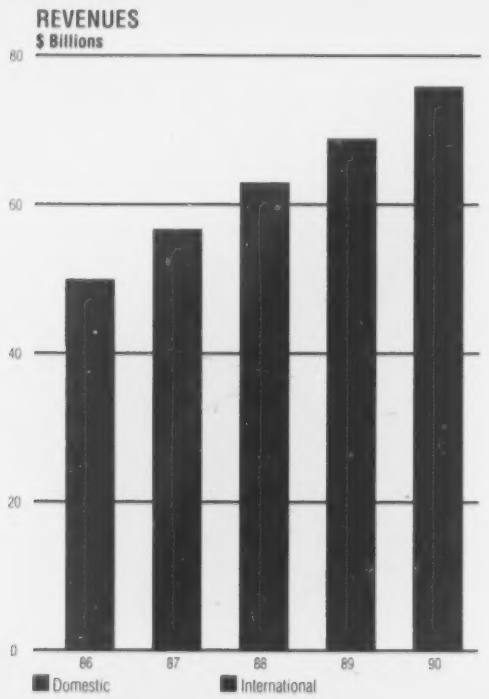
June, 1991

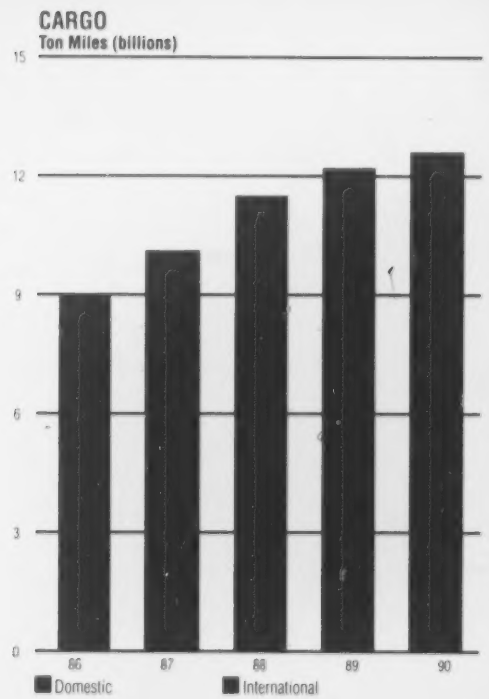
1980-1990 SUMMARY
U.S. Scheduled Airlines

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Traffic–Scheduled Service											
Revenue passengers enplaned (000)	296,903	285,976	294,102	318,638	344,683	382,022	418,946	447,678	454,614	453,692	465,557
Revenue passenger miles (000)	255,192,114	248,887,801	259,643,870	281,829,148	305,115,855	336,403,021	366,545,855	404,471,484	423,301,559	432,714,309	457,915,220
Available seat miles (000)	432,535,103	424,897,230	440,119,206	464,537,979	515,323,339	547,788,432	607,435,847	648,720,938	676,802,328	684,375,876	733,353,609
Revenue passenger load factor (%)	59.0	58.6	59.0	60.7	59.2	61.4	60.3	62.3	62.5	63.2	62.4
Average passenger trip length (miles)	860	870	883	884	885	881	875	903	931	954	984
Freight and express ton miles (000)	5,741,567	5,686,087	5,482,198	6,092,932	6,566,571	6,030,543	7,344,054	8,260,278	9,632,219	10,275,002	10,600,100
Aircraft departures	5,352,927	5,211,867	4,963,794	5,033,906	5,448,150	5,835,474	6,426,970	6,581,309	6,699,564	6,622,080	6,922,937
Financial											
Passenger revenue ($000)	28,048,689	30,722,629	30,549,719	32,744,618	36,939,345	39,235,809	40,056,093	44,940,391	50,295,686	53,802,067	58,435,048
Freight and express revenue ($000)	2,431,926	2,596,850	2,437,703	2,592,567	2,859,419	2,680,715	5,627,996	6,398,156	7,477,731	6,892,754	5,434,382
Mail revenue ($000)	610,996	653,996	688,675	653,129	712,070	889,575	838,278	923,022	971,807	955,455	970,489
Charter revenue ($000)	1,160,524	1,175,154	1,085,537	1,075,428	1,112,050	1,279,812	1,268,899	1,611,673	1,697,793	2,051,883	2,876,501
Total operating revenue ($000)	33,727,806	36,662,555	36,407,635	38,953,672	43,825,047	46,664,414	50,524,933	56,985,709	63,748,886	69,315,854	76,105,419
Total operating expense ($000)	33,949,421	37,117,325	37,141,070	38,643,262	41,673,536	45,238,150	49,201,832	54,516,820	60,312,383	67,504,587	78,019,476
Operating profit ($000)	(221,615)	(454,770)	(733,435)	310,410	2,151,511	1,426,264	1,323,101	2,468,889	3,436,503	1,811,267	(1,914,057)
Interest expense ($000)	967,719	1,209,461	1,384,084	1,482,352	1,540,377	1,588,306	1,692,548	1,695,388	1,845,762	1,944,388	1,977,354
Net profit ($000)	17,414	(300,826)	(915,814)	(188,051)	824,668	862,715	(234,909)	593,398	1,685,599	127,902	(3,922,702)
Revenue per passenger mile (¢)	11.0	12.3	11.8	11.6	12.1	11.7	10.9	11.1	11.9	12.4	12.8
Rate of return on investment (%)	5.3	4.7	2.1	6.0	9.9	9.6	4.9	7.2	10.8	6.3	(6.0)
Operating profit margin (%)	(0.7)	(1.2)	(2.0)	0.8	4.9	3.1	2.6	4.3	5.4	2.6	(2.5)
Net profit margin (%)	0.1	(0.8)	(2.5)	(0.5)	1.9	1.8	(0.5)	1.0	2.6	0.2	(5.2)
Employees	360,517	349,864	330,495	328,648	345,079	355,113	421,686	457,349	480,553	506,728	545,809

Note: Federal Express began reporting as a Section 401 carrier in 1986 and is included in 1986 and later years.


PASSENGERS
(in millions)
500
450
400
350
300
86
87
88
89
90
Domestic
International


REVENUES
$ Billions
80
60
40
20
0
86
87
88
89
90
Domestic
International


CARGO
Ton Miles (billions)
15
12
9
6
3
0
86
87
88
89
90
Domestic
International

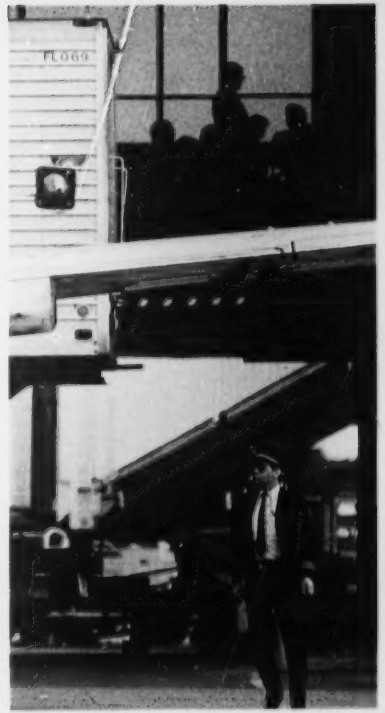
TOP 30 DOMESTIC AIRLINE MARKETS*

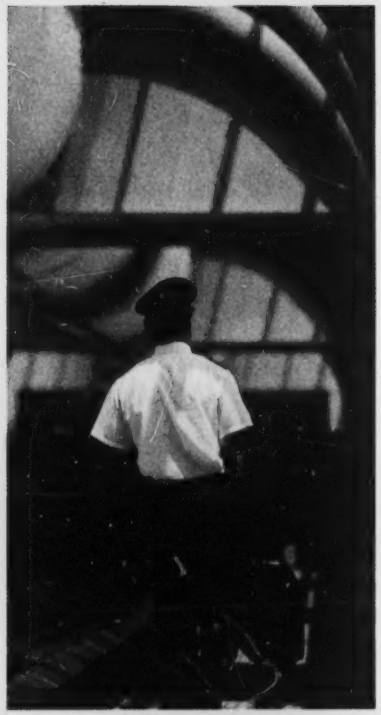
Passengers – Outbound plus Inbound

(Twelve Months Ended December, 1990)

1	New York	Los Angeles	2,998,810		
2	New York	Boston	2,948,150		
3	New York	Washington	2,877,940		
4	New York	Miami	2,590,830		
5	Los Angeles	San Francisco	2,423,390		
6	New York	Chicago	2,383,640		
7	Dallas/Ft. Worth	Houston	2,306,040		
8	Honolulu	Kahului, Maui	2,055,330		
9	New York	San Francisco	2,042,010		
10	New York	Orlando	2,004,030		
11	New York	Ft. Lauderdale	1,965,890		
12	Chicago	Detroit	1,646,050		
13	Honolulu	Lihue, Kauai	1,586,470		
14	Los Angeles	Phoenix	1,569,150		
15	New York	San Juan	1,558,050		
16	New York	West Palm Beach	1,448,340		
17	Los Angeles	Honolulu	1,394,890		
18	New York	Atlanta	1,306,700		
19	Chicago	Los Angeles	1,197,930		
20	Honolulu	Kona, Hawaii	1,137,390		
21	New York	Tampa	1,123,310		
22	Chicago	St. Louis	1,113,490		
23	New York	Dallas/Ft. Worth	1,055,370		
24	Boston	Washington	1,036,410		
25	Honolulu	Hilo, Hawaii	995,650		
26	San Francisco	San Diego	966,770		
27	Chicago	Kansas City	956,610		
28	Dallas/Ft. Worth	San Antonio	931,820		
29	San Francisco	Honolulu	931,190		
30	Phoenix	San Diego	926,760		

*Includes all commercial airports in a metropolitan area. Does not include connecting passengers.





U.S. AIR CARRIER TRAFFIC AT LEADING U.S. AIRPORTS – 1990

Scheduled Service

Passenger Enplanements

Chicago O'Hare	25,607,018	New York (JFK)	9,567,157
Dallas/Ft. Worth	22,826,069	Boston	9,354,028
Atlanta	22,647,507	St. Louis	9,282,370
Los Angeles	18,107,195	Miami	9,133,761
San Francisco	13,256,191	Minneapolis/St. Paul	8,759,303
Denver	11,930,959	Honolulu	8,411,324
New York (LGA)	10,531,443	Pittsburgh	7,878,134
Phoenix	10,342,473	Orlando	7,541,636
Detroit	9,836,369	Houston	7,510,842
Newark	9,784,178	Las Vegas	7,400,107

Cargo Tons Enplaned

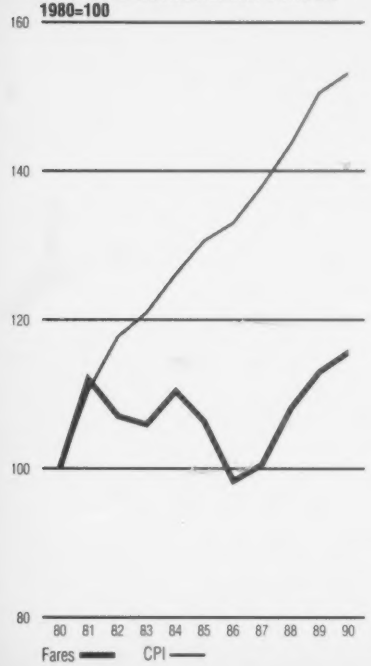
Chicago O'Hare	381,825	Newark	149,149
Los Angeles	371,650	Boston	136,626
Memphis	331,584	Seattle	125,515
New York (JFK)	315,618	Minneapolis/St. Paul	97,250
Anchorage	289,925	Denver	95,117
San Francisco	245,206	Philadelphia	83,761
Atlanta	243,248	St. Louis	81,729
Dallas/Ft. Worth	212,259	Houston	75,533
Miami	190,186	Detroit	69,005
Honolulu	153,935	Indianapolis	67,933

ATA AIRLINE STATISTICS – 1990

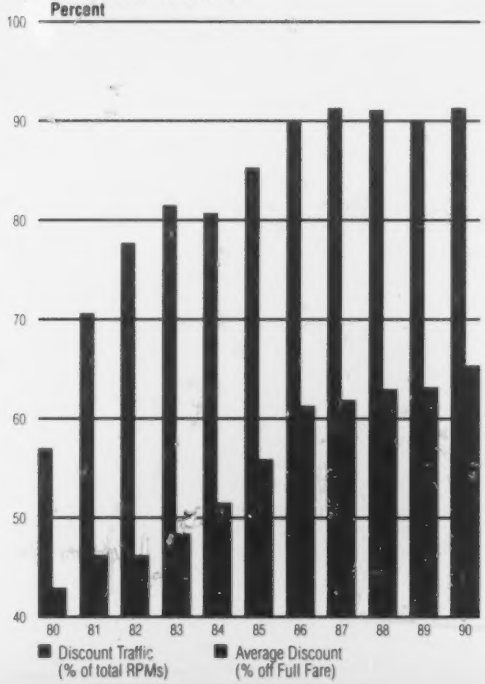
	Number of Aircraft	Employees	Aircraft Departures	Passengers (000)	Revenue Passenger Miles (000)	Passenger Revenues ($000)	Cargo Revenues ($000)	Total Operating Revenues ($000)	Operating Profit/ (Loss) ($000)	Net Profit/ (Loss) ($000)
Alaska	63	5,822	110,065	5,405	4,458,088	781,994	63,467	895,741	17,151	15,046
Aloha	18	1,808	73,303	4,626	623,692	153,069	23,092	188,852	7,513	1,510
American	552	85,680	827,651	73,227	76,877,841	9,729,319	428,894	11,008,677	(67,973)	(76,777)
American Trans Air	23	2,127	1,518	233	399,594	301,879	–	369,628	12,330	743
Continental	340	33,553	489,261	35,166	39,171,942	4,540,771	245,605	5,202,234	(241,815)	(1,236,387)
Delta	444	64,791	877,501	65,729	58,982,447	8,150,766	432,525	8,746,083	(235,128)	(154,033)
DHL	25	NA	NA	NA	NA	NA	NA	NA	NA	NA
Eastern	169	19,075	278,412	21,386	16,642,874	1,939,280	59,374	2,181,796	(533,354)	(1,125,908)
Evergreen*	39	555	6,191	–	–	–	173,355	217,608	22,626	3,117
Federal Express	416	80,006	241,299	–	–	–	2,746,259	7,612,986	423,695	127,366
Hawaiian	33	2,643	71,942	4,735	2,579,520	249,020	14,045	340,024	(92,727)	(114,253)
Midway	96	5,171	122,337	6,489	4,850,046	585,980	16,561	614,809	(84,530)	(139,215)
Northwest	332	35,775	517,644	40,899	51,490,194	6,337,961	647,517	7,257,110	(141,666)	(10,412)
Pan American	154	28,823	171,945	17,503	31,070,826	3,346,701	250,187	3,930,722	(490,459)	(638,074)
Southwest	106	8,203	338,106	22,064	9,971,634	1,144,421	22,196	1,186,831	81,616	47,083
Trans World	207	33,189	301,328	24,166	34,236,400	3,848,871	222,807	4,606,082	(162,206)	(237,564)
Trump Shuttle	21	1,082	22,375	1,712	345,726	154,486	103	172,013	(40,122)	(68,761)
United	462	70,179	653,782	57,550	75,944,406	9,534,189	592,872	10,956,059	(54,252)	95,755
United Parcel Service*	118	2,768	69,565	–	–	–	887,656	891,090	12,145	38,449
USAir	454	50,464	1,038,911	60,059	35,549,009	5,753,353	157,726	6,084,704	(543,235)	(410,749)
Associate Members										
Air Canada	115	23,000	156,629	11,800	16,577,000	3,126,000	413,000	3,939,000	(11,000)	(74,000)
Canadian	88	16,500	144,346	8,963	13,851,000	2,095,000	221,000	2,745,000	(11,700)	(14,600)

*Includes non-scheduled services NA = Not Available

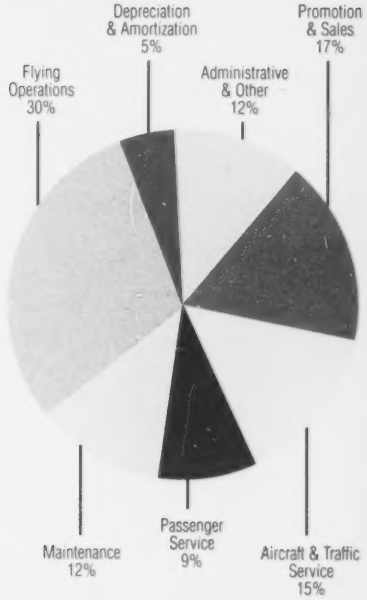
FARES vs CONSUMERS PRICES

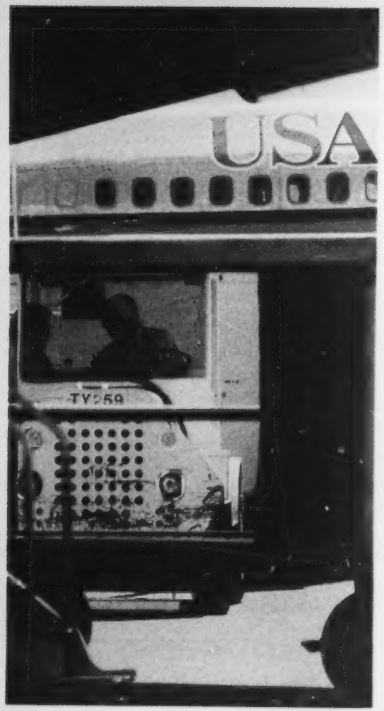


DISCOUNT TRAFFIC



EXPENSES





SAFETY

U.S. Air Carriers
Scheduled Service

	Departures (Millions)	Fatal Accidents	Fatalities	Fatal Accidents Per 100,000 Departures
1980	5.4	1	1	0.000
1981	5.2	4	4	0.077
1982	5.0	5*	235	0.081*
1983	5.0	4	15	0.079
1984	5.4	1	4	0.018
1985	5.8	7	197	0.120
1986	6.4	3*	5	0.031*
1987	6.6	5*	231	0.061*
1988	6.7	3*	285	0.030*
1989	6.6	11	278	0.166
1990	6.9	6	39	0.087

*Sabotage caused accidents are included in the Accidents but not in the Accident Rates.

Source: National Transportation Safety Board

1990 AIR TRAVEL SURVEY

	1980	1989	1990
Percent of adults who have:			
Ever flown	65%	78%	74%
Flown in past 12 months	24	34	31
Purpose of trips taken:			
Business Trips	52	51	48
Pleasure/Personal Trips	48	49	52

Source: Gallup/ATA Survey

FAA AVIATION FORECASTS

Commercial Air Carriers FY 1991-2002

Year	Passengers (millions)	RPMs (billions)	Jet Aircraft	Departures (millions)
1991	462.6	456.4	4,079	6.6
1992	481.7	481.3	4,272	6.8
1993	505.4	507.9	4,454	7.0
1994	527.5	534.6	4,673	7.2
1995	556.0	567.3	4,904	7.4
1996	585.1	600.7	5,108	7.6
1997	612.3	632.7	5,206	7.8
1998	638.4	664.0	5,249	8.0
1999	664.3	694.4	5,277	8.1
2000	688.6	723.3	5,345	8.3
2001	719.5	759.6	5,433	8.4
2002	748.7	794.3	5,508	8.6

OPERATING FLEET – ATA AIRLINES

As of December 31, 1990

	ALASKA	ALOHA	AMERICAN	AMERICAN TRANS AIR	CONTINENTAL	DELTA	DHL	EASTERN	EVERGREEN	FEDERAL EXPRESS	HAWAIIAN	MIDWAY	NORTHWEST	PAN AMERICAN	SOUTHWEST	TRANS WORLD	TRUMP SHUTTLE	UNITED	UNITED PARCEL SERVICE	USAIR	AIR CANADA	CANADIAN	TOTAL
B-747			2		9				17	19			50	31		17		39	7		6	1	198
MD-11						2																	2
DC-10			59		17			2		27			20					54				11	190
L-1011				12		40		11			6					32					14		115
B-767			45			37										11		19		9	21	10	152
A300			25		17			13						13									68
A310														21								8	29
DC-8									3		7							19	47		5		81
B-757			26	4		61		22					33					24	20				190
A320													11								7		18
B-727	28		164	7	103	129	15	52	11	152			71	89		66	21	128	44	29	27		1136
MD-80	28		213		65	67						17	8			33				31			462
DC-9					35	36		69	8		12	43	139			48				74	35		499
B-737	7	18	18		94	72						10			106			179		228		58	790
F-100																				20			20
BAe 146																				18			18
F-28																				45			45
F-27										26													26
DHC-7											8												8
SA-227							10																10
EMBRAER-120												9											9
DORNIER-228												17											17
CESSNA 208										192													192
TOTALS	**63**	**18**	**552**	**23**	**340**	**444**	**25**	**169**	**39**	**416**	**33**	**96**	**332**	**154**	**106**	**207**	**21**	**462**	**118**	**454**	**115**	**88**	**4275**

TRAFFIC AND OPERATIONS DATA
U.S. Scheduled Airlines

	1989			1990		
	Domestic	International	Total	Domestic	International	Total
Passenger Traffic – Scheduled Service						
Revenue Passengers Enplaned (000)	416,331	37,361	453,692	423,711	41,846	465,557
Revenue Passenger Miles (000)	329,975,206	102,739,103	432,714,309	340,219,421	117,695,799	457,915,220
Available Seat Miles (000)	530,079,041	154,296,835	684,375,876	563,043,643	170,309,966	733,353,609
Revenue Passenger Load Factor (%)	62.3	66.6	63.2	60.4	69.1	62.4
Average Length of Haul (Miles)	793	2,750	954	803	2,813	984
Cargo Traffic (Ton Miles) – Scheduled Service						
Total (000)	6,331,605	5,854,892	12,186,497	6,566,346	6,037,310	12,603,656
Freight and Express (000)	4,916,204	5,358,798	10,275,002	5,076,344	5,523,756	10,600,100
U.S. Mail (000)	1,414,750	463,901	1,878,651	1,490,002	513,554	2,003,556
Foreign Mail (000)	651	32,193	32,844	–	–	–
Overall Traffic and Operations Data						
Total revenue ton miles – Charter service (000)	3,146,634	2,490,810	5,637,444	3,120,465	2,197,961	5,318,426
Total revenue ton miles – All services (000)	42,475,761	18,619,610	61,095,371	43,705,513	20,004,849	63,710,362
Total Available ton miles – All services (000)	78,955,003	30,442,123	109,397,126	83,374,559	33,637,286	117,011,845
Ton mile load factor – All services (%)	53.8	61.2	55.8	52.4	59.5	54.4
Revenue Aircraft Departures – Scheduled services	6,294,176	327,904	6,622,080	6,556,877	366,060	6,922,937
Revenue Aircraft Miles – Scheduled services (000)	3,590,793	602,027	4,192,820	3,817,716	673,668	4,491,384
Revenue Aircraft Hours – Scheduled services	8,821,165	1,224,688	10,045,853	9,362,678	1,371,213	10,733,891

B-747

B-737

AIRCRAFT ON ORDER – ATA AIRLINES

As of December 31, 1990

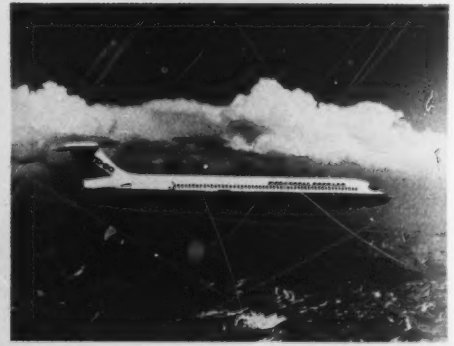
Aircraft Type	Number		Firm Order Delivery Dates			
	Firm	Options	1991	1992	1993	1994 & Beyond
Airbus						
A300	10	1	5	4	1	
A310	2		2			
A320	142	67	26	37	32	47
A330	49	30				49
A340	27	14		1	7	19
Boeing						
B-737	375	436	45	53	75	202
B-747	52	40	12	4	7	29
B-757	235	266	58	61	34	82
B-767	67	86	21	15	22	9
B-777	34	34				34
Fokker						
100	95	75	23	32	29	11
McDonnell Douglas						
MD-80	128	172	66	34	16	12
MD-90	70	130				70
MD-11	38	73	12	18	6	2
Totals	**1324**	**1424**	**270**	**259**	**229**	**566**

The value of firm aircraft orders was $65.3 billion.

MD-11

A320

FOKKER 100



MD-80

AIRCRAFT OPERATING STATISTICS

Figures are averages for most commonly used models

	Number of Seats	Speed Airborne	Flight Length	Fuel (Gallons Per Hour)	Aircraft Operating Cost Per Hour
B747-100	405	519	3,149	3,529	$6,132
L-1011-100/200	296	498	1,631	2,215	3,885
DC-10-10	288	484	1,410	2,174	4,236
A300 B4	258	460	1,221	1,482	3,526
A310-300	240	473	1,512	1,574	3,484
B767-300	230	478	1,668	1,503	3,334
B767-200	193	475	1,736	1,377	2,887
B757-200	188	449	984	985	2,301
B727-200	148	427	688	1,249	2,247
MD-80	142	416	667	882	1,861
B737-300	131	413	605	732	1,826
DC-9-50	122	378	685	848	1,830
B727-100	115	422	626	1,104	2,031
B737-100/200	112	388	440	806	1,772
F-100	103	360	384	631	1,456
DC-9-30	102	377	421	804	1,778
DC-9-10	78	376	394	764	1,588

B-757

B-767

TOP 25 AIRLINES IN 1990*

	Passengers (000)
1 American	73,227
2 Delta	65,729
3 USAir	60,059
4 United	57,550
5 Northwest	40,899
6 Continental	35,166
7 Trans World	24,166
8 Southwest	22,064
9 Eastern	21,386
10 Pan American	17,503
11 America West	15,567
12 Midway	6,489
13 Alaska	5,405
14 Hawaiian	4,735
15 Aloha	4,626
16 West Air	2,282
17 Air Wisconsin	2,248
18 Horizon Air	1,816
19 Trump Shuttle	1,712
20 Midwest Express	754
21 Executive Airlines	467
22 Markair	437
23 Aspen	390
24 Pacific Interstate	243
25 American Trans Air	233

	Revenue Passenger Miles (000)
1 American	76,877,841
2 United	75,944,406
3 Delta	58,982,447
4 Northwest	51,490,194
5 Continental	39,171,942
6 USAir	35,549,009
7 Trans World	34,236,400
8 Pan American	31,070,826
9 Eastern	16,642,874
10 America West	11,062,953
11 Southwest	9,971,634
12 Midway	4,850,046
13 Alaska	4,458,088
14 Hawaiian	2,579,520
15 Tower	1,137,423
16 Aloha	623,692
17 Midwest Express	570,479
18 West Air	523,531
19 Air Wisconsin	465,326
20 American Trans Air	399,594
21 Horizon Air	357,343
22 Trump Shuttle	345,726
23 Markair	182,373
24 Pacific Interstate	148,829
25 MGM Grand	85,670

	Freight Ton Miles (000)
1 Federal Express	4,023,383
2 Northwest	1,604,199
3 United	1,063,201
4 American	817,746
5 Pan American	699,228
6 Delta	573,444
7 Continental	541,239
8 Trans World	467,834
9 Challenge Air Cargo	115,132
10 USAir	114,213
11 United Parcel Service	83,794
12 Eastern	80,253
13 Rosenbalm	74,922
14 America West	65,732
15 Arrow	63,358
16 Air Transport Int'l	60,591
17 Alaska	43,416
18 Zantop	28,718
19 Amerijet	15,649
20 Markair	11,815
21 Southwest	9,643
22 Hawaiian	8,841
23 Aloha	8,131
24 Northern Air	8,016
25 Midway	6,512

	Total Operating Revenues ($000)
1 American	11,008,677
2 United	10,956,059
3 Delta	8,746,083
4 Federal Express	7,612,986
5 Northwest	7,257,110
6 USAir	6,084,704
7 Continental	5,202,234
8 Trans World	4,606,082
9 Pan American	3,930,722
10 Eastern	2,181,796
11 America West	1,321,642
12 Southwest	1,186,831
13 Alaska	895,741
14 United Parcel Service	891,090
15 Midway	614,809
16 American Trans Air	369,628
17 Hawaiian	340,024
18 World	243,681
19 Evergreen	217,608
20 West Air	209,764
21 Air Wisconsin	196,649
22 Aloha	188,852
23 Tower	172,285
24 Trump Shuttle	172,013
25 Horizon Air	163,820

*Carriers certificated under Section 401, Federal Aviation Act.

EMPLOYMENT

U.S. Scheduled Airlines	1980	1989	1990
Pilots and Copilots	31,665	43,671	47,131
Other Flight Personnel	6,906	8,070	8,904
Flight Attendants	54,418	77,771	83,443
Mechanics	43,268	57,282	60,952
Aircraft and Traffic Service Personnel	122,485	225,166	251,187
Office Employees	67,132	42,717	43,883
All Other	34,643	52,051	50,309
Total Employment	360,517	506,728	545,809

PASSENGER YIELD

Revenue per Passenger Mile (¢)

	1980	1989	1990
Domestic	11.6	13.1	13.4
International	9.0	10.4	10.8
Total	11.0	12.4	12.8

FREIGHT AND EXPRESS YIELD

Revenue per Freight & Express Ton Mile (¢)

	1980*	1989	1990
Domestic	48.6	95.0	64.0
International	36.5	41.1	39.3
Total	43.5	67.2	51.4

*Does not include Federal Express

INCOME STATEMENT ($000)
U.S. Scheduled Airlines

	1989			1990		
	Domestic	International	Total	Domestic	International	Total
Operating Revenues:						
Passenger	43,156,524	10,645,543	53,802,067	45,723,610	12,711,438	58,435,048
Freight and Express	4,760,714	2,132,040	6,892,754	3,288,180	2,146,201	5,434,381
Mail	767,171	188,284	955,455	747,072	223,417	970,489
Charter	1,231,288	820,595	2,051,883	1,699,459	1,177,042	2,876,501
Public Service Revenue	3,193	0	3,193	2,661	0	2,661
Other	4,486,051	1,124,451	5,610,502	6,693,997	1,692,342	8,386,339
Total Operating Revenues	54,404,941	14,910,913	69,315,854	58,154,979	17,950,440	76,105,419
Operating Expenses:						
Flying Operations	14,792,852	3,918,537	18,711,389	18,282,326	5,416,602	23,698,928
Maintenance	6,199,662	1,723,953	7,923,615	6,956,070	2,046,726	9,002,796
Passenger Service	4,774,529	1,454,202	6,228,731	5,222,762	1,734,039	6,956,801
Aircraft & Traffic Servicing	9,448,830	2,482,895	11,931,725	9,095,299	2,651,941	11,747,240
Promotion and Sales	8,717,751	3,107,656	11,825,407	9,107,771	3,827,621	12,935,392
Administrative	3,076,772	808,508	3,885,280	3,041,227	869,306	3,910,533
Transport Related	2,461,842	711,735	3,173,577	4,189,382	1,417,171	5,606,553
Depreciation and Amortization	3,078,816	746,047	3,824,863	3,272,550	888,683	4,161,233
Total Operating Expenses	52,551,054	14,953,533	67,504,587	59,167,387	18,852,089	78,019,476
Operating Income or (Loss)	1,853,887	(42,620)	1,811,267	(1,012,408)	(901,649)	(1,914,057)
Other Income or (Expense)						
Interest Expense	(1,474,146)	(470,242)	(1,944,388)	(1,483,635)	(493,718)	(1,977,353)
Income Taxes	(1,034,438)	(63,158)	(1,097,596)	(210,856)	242,940	32,084
Other	1,051,203	307,416	1,358,619	(675,988)	612,612	(63,376)
Net Profit or (Loss)	396,506	(268,604)	127,902	(3,382,887)	(539,815)	(3,922,702)
Operating Profit Margin (%)	3.4	-0.3	2.6	-1.7	-5.0	-2.5
Net Profit Margin (%)	0.7	-1.8	0.2	-5.8	-3.0	-5.2

BALANCE SHEET ($000)

U.S. Scheduled Airlines

	1989	1990
Assets		
Current Assets	15,081,114	15,704,252
Investments and special funds	3,083,019	4,725,005
Flight equipment owned	38,811,871	40,203,503
Ground equipment & property	11,940,666	13,618,595
Reserve for depreciation (Owned)	(19,030,023)	(20,606,172)
Leased equipment & property capitalized	7,067,961	8,292,663
Reserve for depreciation (Leased)	(2,462,514)	(3,057,271)
Other property	3,270,422	4,217,248
Deferred charges	4,741,368	4,784,019
Total assets	62,503,884	67,881,842
Liabilities		
Current liabilities	18,940,357	23,774,885
Long-term debt	11,726,506	11,335,653
Other non-current	9,892,113	14,946,851
Deferred credit	7,032,080	8,027,817
Stockholders' equity – net of Treasury Stock	14,912,828	9,796,636
Preferred stock	257,472	267,981
Common stock	309,616	308,446
Other paid-in capital	9,318,220	8,559,406
Retained earnings	5,346,487	1,495,798
Less: Treasury Stock	318,967	834,995
Total liabilities and stockholders' equity	62,503,884	67,881,842

U.S. SCHEDULED AIRLINES

Data for the following 67 carriers are included herein.

Majors
(Annual revenues of over $1 billion)

America West
American
Continental
Delta
Eastern
Federal Express
Northwest
Pan American
Southwest
Trans World
United
USAir

Nationals
(Annual revenues of $100 million to $1 billion)

Air Wisconsin
Alaska
Aloha
American Trans Air
Evergreen
Hawaiian
Horizon Air
Markair
Midway
Southern Air
Tower
Trump Shuttle
United Parcel Service
West Air
World

Regionals

Aerial
Air America
Air Transport Int'l
Amerijet
Arrow
Aspen
Buffalo
Casino Express
Challenge Air Cargo
Conner
Connie Kalitta
Discovery
Emerald
Emery
Executive Airlines
Express One
Florida West
Great American
Gulf Air Transport
Independent Air
Jet Fleet
Key
MGM Grand
Midwest Express
Millon
North American
Northern Air
Orion
Pacific Interstate
Private Jet
Reeve
Rich
Rosenbalm
Sun Country
TPI International
Trans Air Link
Trans Continental
Universal
Wrangler
Zantop

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A. Maurice Myers
Aloha Airlines

Robert L. Crandall
American Airlines

George Mikelsons
American Trans Air

Hollis Harris
Continental Airlines

Ronald W. Allen
Delta Air Lines

Patrick Foley
DHL Airways

Martin Shugrue
Eastern Air Lines

Delford M. Smith
Evergreen Int'l Airlines

Frederick W. Smith
Federal Express

J. Thomas Talbot
Hawaiian Airlines

David R. Hinson
Midway Airlines

Frederic V. Malek
Northwest Airlines

Thomas G. Plaskett
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Herbert D. Kelleher
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J.W. Hoar
Trans World Airlines

Richard F. Cozzi
Trump Shuttle

Stephen M. Wolf
United Airlines

Richard Oehme
United Parcel Service

Seth E. Schofield
USAir

ATA MEMBER AIRLINES – 1991

Alaska Airlines
P.O. Box 68900
Seattle-Tacoma Int'l Airport
Seattle, Washington 98168-0900
(206) 433-3200

Aloha Airlines
P.O. Box 30028
Honolulu, Hawaii 96820-0228
(808) 836-1111

American Airlines
P.O. Box 619616
DFW Airport, Texas 75261-9616
(817) 963-1234

American Trans Air
P.O. Box 51609
Indianapolis International Airport
Indianapolis, Indiana 46251-0609
(317) 247-4000

Continental Airlines
P.O. Box 4607
Houston, Texas 77210-4607
(713) 834-5000

Delta Air Lines
Hartsfield Atlanta International Airport
Atlanta, Georgia 30320-9998
(404) 765-2600

DHL Airways
333 Twin Dolphin Drive
Redwood City, California 94065-1515
(415) 593-7474

Eastern Air Lines
Miami International Airport
Miami, Florida 33148-0001
(305) 873-2211

Evergreen International Airlines
3850 Three Mile Lane
McMinnville, Oregon 97128-9496
(503) 472-0011

Federal Express
P.O. Box 727
Memphis, Tennessee 38116
(901) 369-3600

Hawaiian Airlines
P.O. Box 30008
Honolulu International Airport
Honolulu, Hawaii 96820-0008
(808) 525-5511

Midway Airlines
5959 South Cicero Avenue
Chicago, Illinois 60638-3821
(312) 838-0001

Northwest Airlines
Minneapolis-St. Paul Int'l Airport
St. Paul, Minnesota 55111-3075
(612) 726-2111

Pan American World Airways
Pan Am Building
200 Park Avenue
New York, New York 10166-0001
(212) 880-1234

Southwest Airlines
Box 36611, Love Field
Dallas, Texas 75235-1625
(214) 904-4000

Trans World Airlines
100 South Bedford Road
Mt. Kisco, New York 10549
(914) 242-3000

Trump Shuttle
Bulova Corporate Center
75-20 Astoria Blvd.
Jackson Heights, New York 11370
(718) 397-6000

United Airlines
P.O. Box 66100
Chicago, Illinois 60666-0100
(708) 952-4000

United Parcel Service
51 Weaver Street
Greenwich, Connecticut 06830-3160
(203) 622-6000

USAir
2345 Crystal Drive
Crystal Park 4
Arlington, Virginia 22227
(703) 418-7000

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Montreal, Quebec
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Executive Vice President

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Planning

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Senior Vice President &
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Walter S. Coleman
Vice President, Operations

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International Affairs

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Airline Industry Data

Richard T. Brandenburg
Treasurer

DEFINITION OF TERMS

U.S. Scheduled Airlines. Carriers certificated by the Federal government under Section 401 of the Federal Aviation Act permitting the operation of large aircraft.

Revenue Passenger Mile. One fare-paying passenger transported one mile.

Available Seat Mile. One seat transported one mile.

Revenue Passenger Enplanements. The total number of revenue passengers boarding aircraft in scheduled service, including origination, stopover or connecting passengers.

Load Factor. The percentage of seating or freight capacity which is utilized.

Revenue Ton Mile. One ton of revenue traffic (passengers and cargo) transported one mile.

Available Ton Mile. One ton of capacity (passengers and cargo) transported one mile.

Air Cargo. Total volume of freight, mail and express traffic transported by air. Statistics include the following:

Freight and Express – Commodities of all kinds – includes small package counter services, express services and priority reserved freight.

U.S. Mail – All classes of mail transported for the U.S. Postal Service.

Net Profit Margin. Net profit after interest and after taxes as percent of operating revenues.

Operating Profit Margin. Operating profit (operating revenues minus operating expenses) as percent of operating revenues.

ata

Air Transport Association of America
1709 New York Avenue, N.W.
Washington, D.C. 20006-5206
202/626-4175

June 1991

Price: $10.00